

## Dynamics 365 Portals with Centauri

Dynamics 365 Portal is a rich, fully featured web portal platform which is completely integrated with your Dynamics 365 system. With Dynamics 365 Portal the boundaries between your online offer to your customers and your back office systems are removed. You can control all aspects of the design and operation of your web portals from within your Dynamics 365 system, securely delivering data from your Dynamics 365 system to your online customers in real time.

A Dynamics 365 portal provides your audience with an online location to communicate, collaborate and transact. Depending on the audience, that the portal is geared toward (such as whether it's for customers, business partners, or internal team members), a Dynamics 365 portal can allow people to get support for issues, purchase products, search knowledge guides and how-to guides, collaborate with communities, suggest new ideas, and learn more about your products and services.

There will be no new hardware to procure, certificates to install, or web servers to provision. In a few clicks, your new integrated web presence is ready to go and waiting for you to mould it into an online game-changer.

If you have a Dynamics 365 Enterprise subscription already, then you likely have at least one Dynamics 365 portal license at the ready.



### “Our business already has a website... why do we need a Dynamics 365 portal?”

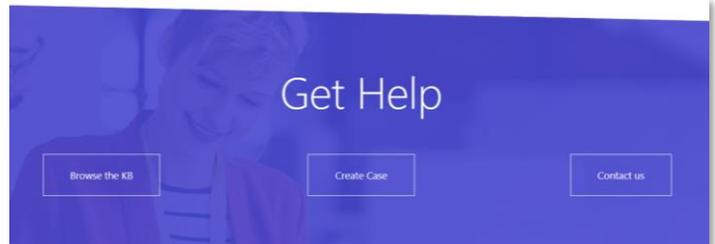
Your website is great as a front to your organization, and as a potential lead generation point of entry. Dynamics 365 portals do not supplant that in any way, but rather extend your web presence beyond the homepage and into a territory of engagement and active communication. Your customers are getting savvier and, if we're being honest, your customers' grandparents are too. Meet them on their terms by enabling your business to support a connected world.

## Templates to Get You Up and Running

There are many wins to be had with a properly leveraged portal. Dynamics 365 comes complete with pre-packaged templates which allow you to get productive web portals up and running quickly. The templates include...

### Customer Self-Help

You have customers... customers need support. Enter the **Customer Service** portal. If you're using or planning to use CRM for case management, a fantastic extension to that is the Customer Service portal. Giving your customers the ability to log into their own account to submit and monitor their support cases can add some relief to your front lines of customer support. You'll get fewer emails and calls from folks just looking for updates, and you can capture better targeted data regarding a case.



Have a customer submit a case online and be able to see which exact products, down to the SKU, that this person has purchased in the past.

The customer service portal also has the ability to show a customer suggested knowledge base articles based on keywords they have entered before they even submit their case. What's a good way to keep support cases down? Answering questions before they've even been submitted is a good start.

### Partner Engagement

If you're engaging a business partner to help you move product (such as a distributor, reseller, supplier, etc.), you can use the **Partner Portal** to start capturing sales channel data from your partners just as you would from your own captive sales staff.

Let your external partners create, manage, and collaborate on their own opportunities alongside your in-house staff. Start gathering real-time metrics from your partner channels and giving your own partner agents better access to the data you want them to have.

The Partner Portal is all about simultaneously empowering your partners to make better and faster decisions while removing artificial barriers to their success. In addition, you enable yourself to collect richer data that can help in future strategic planning.

### Employee Engagement

Similar to your intranet, the **Employee Portal** can give your internal staff a place to curate and share internal knowledge. You can also give specialized groups very targeted access to CRM features without giving them the entire front-end. This can be helpful for staff that needs to interact with CRM data only in rare cases. Much like the Customer Service Portal, the Employee Portal can be used to submit and resolve internal trouble tickets.

## Centauri's Membership and Events Portal Extensions

As part of our Membership Solution, Centauri have developed Membership and Events Pages that can be added to your portal to extend services to members for Membership based organisations. The Centauri Membership portal extensions delivers online functions through the Dynamics Portals service allowing members to purchase products and services online such as training and member events. You use the portals functions to provide services such as Find-A-Member and online news and knowledgebase services. The web portal service provides mobile responsive web pages that give your members access from anywhere

### Find a Member

**Name**

**Suburb**

**Region**

**Service Type**

**Search**



## Centauri's e-Commerce Extensions

Centauri's e-Commerce extensions to Dynamics 365 portals allow you to add e-Commerce to you web portal, so that you customers can purchase your products and services. The e-Commerce extensions use shopping cart functionality and integrations with popular payment gateways to deliver a seamless online shopping experience.

A key advantage of deploying your e-Commerce offer on Dynamics 365 Portal is that transactions records generated by e-Commerce sales are created in your Dynamics 365 in real time. So that, orders, invoices and payments are recorded in office systems, giving you real time reporting on your e-Commerce operations and allowing back office staff to action fulfilment immediately.

### Your Shopping Cart

**Order ID\***

Product Details ↑	Item Price	Quantity	Tax	Total	
2019 Motor Trade Diary	\$20.00	1	\$2.00	\$22.00	▼

### Delivery Options

**Delivery Method**

- Delivery
- Pick Up

## A Custom Portal Framework to Build Your Portal Your Way

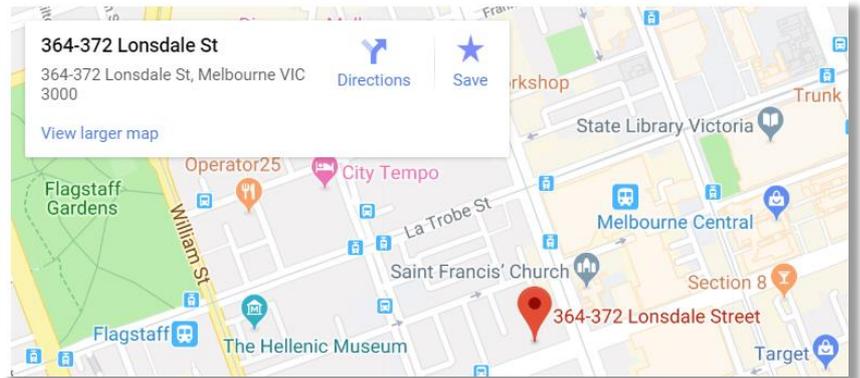
The custom portal framework is completely extensible and customizable. It gives you a fantastic jump-start by minimizing the up-front overhead costs associated with infrastructure and platform development, and lets you get right to the meat of defining “what do we need this thing to do”.

Need to manage franchises? Create a Franchise Portal. Need to manage independent agents? Create an Agent Portal. How about portfolios, investments, service technicians, professional relationships, certificate requests, or just standing up your own storefront? These are all excellent extensions to bridge communication and offer collaborative functionality to those who otherwise would not have it.

Options to extend the platform include the full range of scripting functionality offered by liquid templates, Javascript and CSS allowing your web developers to employ a vast array of design and functionality options.

The Dynamics 365 Portal provides you the capability to extend your Microsoft Dynamics 365 CRM solution by configuring it to expose specific CRM data and functionality to the expected portal users using configuration only. The portal can be leveraged to model business processes that aren't easily modelled inside CRM or to provide a higher level of integration between your CRM and your clients.

The Portal capabilities of Microsoft Dynamics 365 extends Dynamics 365 CRM to the web delivering a best-in-class web engagement experience for community, partner management, customer service and a breadth of other solution areas. The Portal is easily configurable for your employees, partners and customers. One of the most compelling features of the Dynamics Portal capabilities of Microsoft Dynamics 365 is the set of functionalities centred on presenting Dynamics 365 CRM data and functionality to the web audience using configuration only.



## In Context Editing Tools

Dynamics 365 portals offers a powerful suite of editing tools. Users with suitable permissions can add, modify, or delete webpages and their content without having to directly access the databases and web servers that physically contain these entities. Editing can be performed in any modern browser and is accomplished through the use of two powerful yet intuitive tools

